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**Performance
Management
The New JTF System**

Supervisor Session



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Law

- 5 USC 43

Regulation

- 5 CFR Part 430
- DoD 1400.25-M
SC430



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What is (or may be)

New

- Three Level Rating System:
Excellent (5); Acceptable (3);
Unacceptable (1)
 - (Note math: 1,3,5, not 1,2,3)
- Ninety Day Minimum Appraisal System
- Summary Level Deviation – Can be rated Excellent even if one objective is rated Acceptable (with JTF Approval)



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What is Not New

- System still governed by 5 USC 43 and 5 CFR Chapter 432
- Objectives/Plan in Place within 30 Days
- No Rating without Plan
 - No automatic rollover
 - Army/Navy plans ended August 14th
- Midterm Appraisal still required
- Take action whenever employee is failing even if it's a single objective



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Key Points

- No appraisal permitted without valid support form in place
- Minimum appraisal period is 90 calendar days (with support form in place)
- Two counseling sessions **required** - initial and mid-point
- Rating chain signs first – then



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Key Points

- Discuss objectives with employees prior to issuance
- All objectives are critical; do not identify non-critical objectives.
- Level 3 rating required for Within Grade Increase (WIGI).
 - Deny WIGI if failing (see slide 40)



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Key Points

- No Forced Distribution of ratings (Quota)
- Encourage employee to do self appraisal at the middle and end of the rating cycle
- Objectives and Ratings based solely on performance – **not conduct**



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Annual Appraisal Period

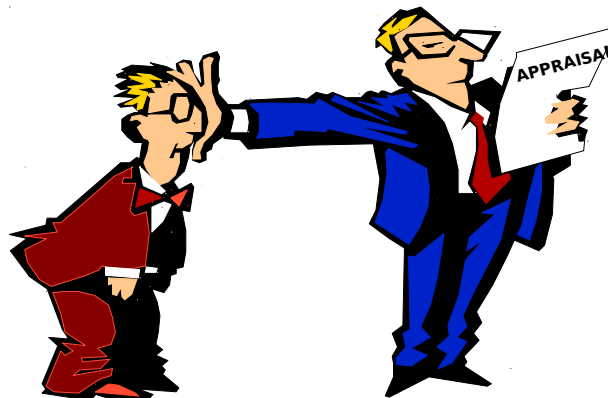
**1 OCTOBER - 30
SEPTEMBER**



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Performance Management: Process



**"Lousy" is a bit general...
Let me tell you what I REALLY think of your
work!!!**



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Performance Management:

Process by which managers, and supervisors **link** the planning, directing, and executing of work with civilian performance appraisal, pay, awards, and promotion.

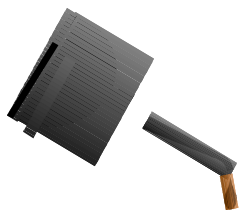


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Linkage

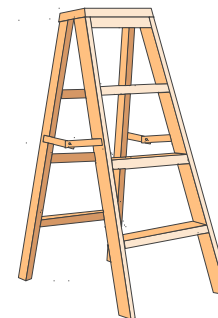


**Compensation
(WIGI's)**

Reduction-in-Force

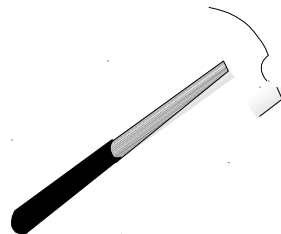
Promotions

Training/Career Development



Rewards

Removal or Reduction in Grade



Retention

Reassignments





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Why is Performance Evaluation so difficult to do?

**...Involves the inherently subjective
and
inexact process of one human being
assessing the work accomplishment
of another**





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Why do we do it?

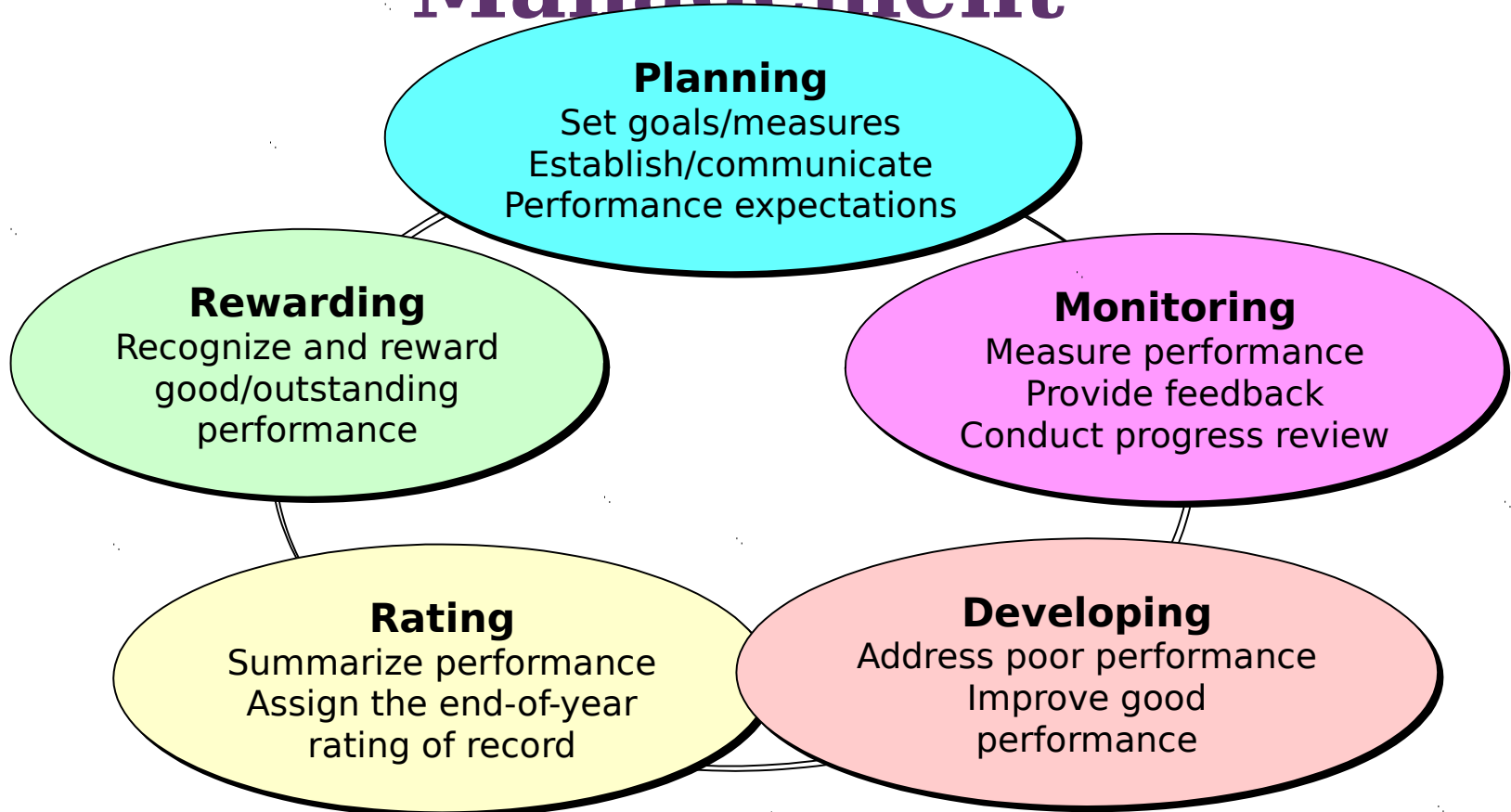
- Encourage peak performance
- Can't afford to tolerate poor performance
 - left unresolved –problem with awards, assignments, effects other employee's morale
- Not as hard as it looks



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Five Key Processes of Performance Management





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Stages in the Process

- **Month 1:**
 - Identify critical objectives for the coming year;
 - Identify developmental/training needs
 - Issue the Plan
- **Month 6:**
 - Mid-term Appraisal
 - Course corrections as needed



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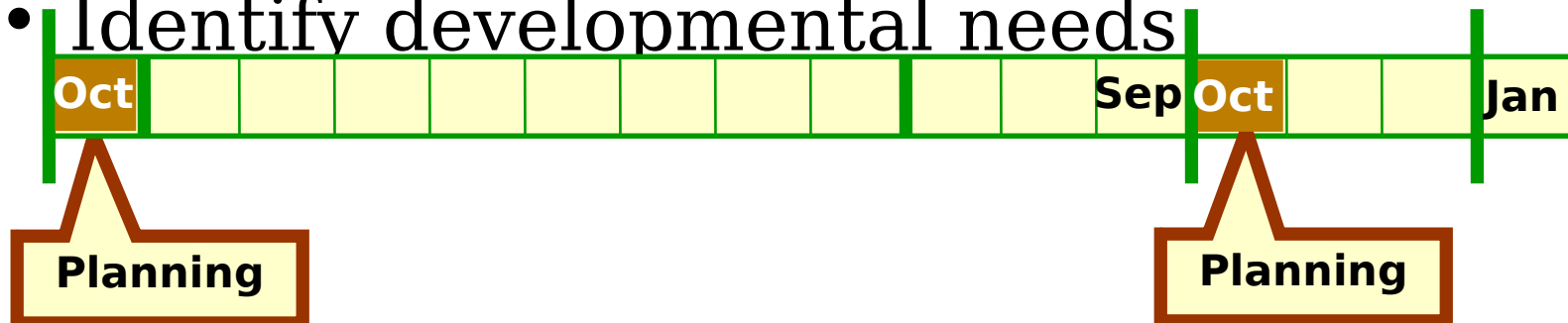
Stages in the Process

- **Month 12:**
 - Evaluations
 - Awards as appropriate
 - Higher level approval before issuance



Performance Planning

- **Establish a written performance plan:**
 - Identify and discuss standards/ objectives
- The performance plan requires higher-level approval
- Basis for ongoing dialogue about performance
- Identify developmental needs





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Performance Standards:

(aka Expectations or Objectives) are the duties, responsibilities, and competencies required by, or objectives associated with, an employee's position and the contributions and demonstrated competencies management expects of an employee



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Process for Standards

- Supervisor drafts standards
- Employee reviews and comments on standards
- Supervisor/employee discuss-clarify
 - Mutual understanding of Standard
- Supervisor issues after Higher-Level review



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Performance Standards

- Yardstick for measurement –**do not just repeat Position Description**
- Should be based on observable results—not knowledge or personal qualities
- Where possible, use objective standards for quantifiable results—percentages, numbers, etc.
- Use subjective criteria for performance not subject to objective criteria



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Writing Standards

- Written at the Acceptable level or level 3
- Start with an action verb
- Specify a single key result to be accomplished
- Specify a target date for accomplishment
- Be as measurable, verifiable, realistic and attainable while still representing a challenge
- Relate directly to employee's role and mission
- Draw a line of sight between the employee's work, the work unit's goals, and the organization's success



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Aligning Work to Mission

There must be a clear nexus between the position description (grade-controlling duties) and the performance standard/objective.



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**Performance
Standards/Objectives:
Common Errors**



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Resources for Job Objectives

- On-line training: iSuccess
 - <http://www.cpms.osd.mil/nsps/iSuccess/>
 - Covers writing effective job objectives and self-assessments
 - Interactive format: While taking the course, you will develop actual job objectives that you can save and print

SEE ALSO

- Army Job Objective Writing Guide
 - <http://www.cpol.army.mil/library/general/nsps/pm-overview.html>
, look for the Objective Samples link, contains sample job objectives



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The Performance Plan Conversation

PURPOSES

- To reach a joint understanding of performance expectations for the current (new) rating cycle
- To explain the organization's goals and to align employee objectives with these goals
- To establish timelines and measurement methods
- To identify developmental needs

OUTCOMES

- Performance plan
- Development plan



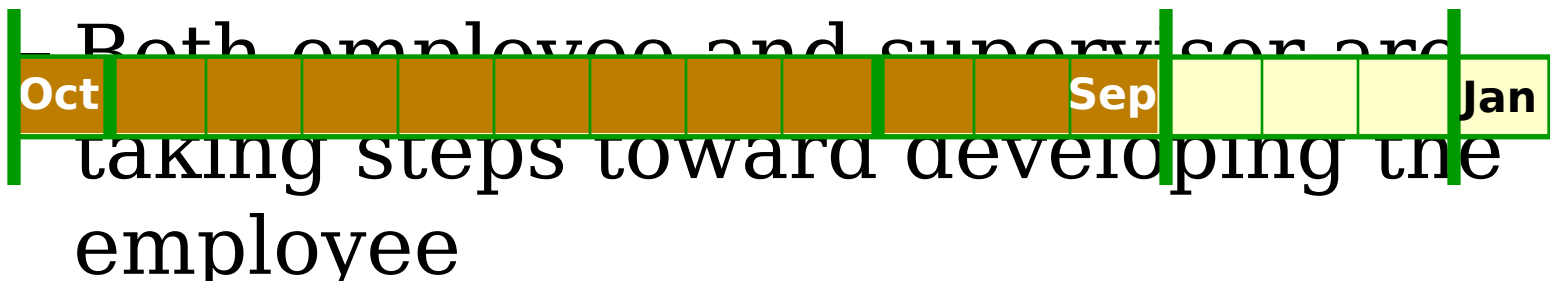
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Performing, Monitoring,

Developing

- Throughout the performance cycle:
 - The employee is working toward accomplishing the established job objectives
 - The supervisor is monitoring employee performance and providing assistance, feedback, and direction as needed





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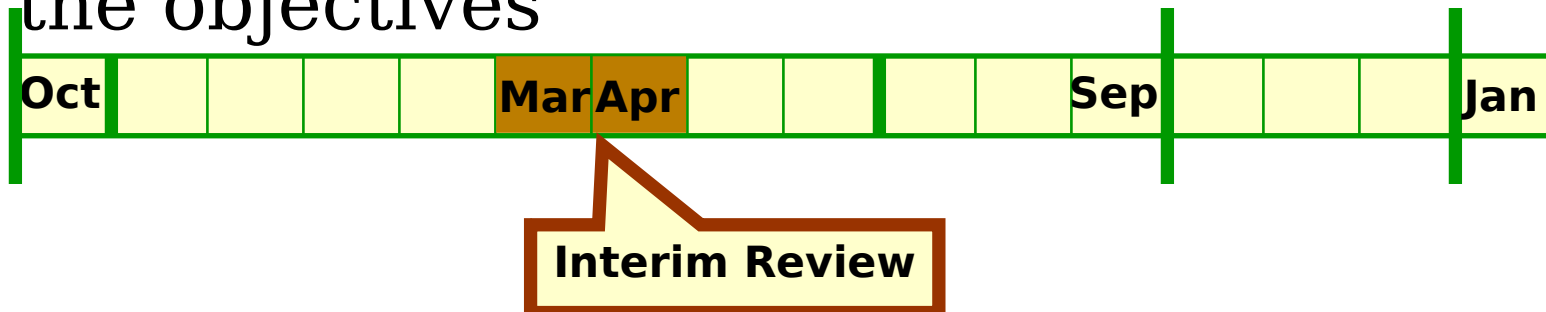
Documenting Performance

- Employees should complete a self-assessment at the end of the rating cycle – **good practice**
- Employees should also complete a self-assessment as part of the Interim Review process – **good practice**
- To facilitate completing the self-assessment, employees are encouraged to maintain a record of their performance throughout the appraisal period
 - Weekly Status Report
 - Outlook's Task List



Interim Review

- An interim performance review is required at least once during the performance management cycle
- Check on progress towards objectives, make necessary adjustments
- Provides an opportunity for feedback so the employee has the direction to achieve the objectives





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Interim Review Conversation



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Continuing Performance Discussions

- Recurring:
 - Revisit performance expectations
 - Check progress
- Formal or informal
- Establish the relationship and ensure framework for the discussion is in place
- Ease the process in the event difficult conversation is required



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Conducting the Performance Discussion

- Focus on the performance problem, not the personality or external issues.
- Always maintain a constructive tone along with a calm and professional demeanor
- Anticipate questions and be prepared to respond in a professional manner





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Conducting the Performance Discussion

- Clearly state performance expectations and seek confirmation that the employee understands.
- Remember that your goal is to improve the employee's performance, not to win an argument



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Adjusting a Performance Plan

- Performance plans may be changed during the year
- The employee should have sufficient time before the end of cycle to work towards a new performance plan
- **Best practice:** No changes in performance plan after mid-cycle review
- No surprises



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Awards

- Subject to budget allocation, heads of JTF organizations can approve up to \$5,000 for employee per year.
- Awards based on percent of pay guidance
 - Excellent 2.5% to 5%
 - Acceptable 1% to 2.4%
- Awards Policy still to be issued
- Incentive and On The Spot Awards are separate from Performance Awards
 - Quality Step Increase (QSI), Time Off, etc.
 - These awards may fall into the Performance Awards Policy



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Taking Performance Based Action



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Performance Improvement Plan

(PIP)

- 5 USC 4302 (b)(6) An employee's right to a reasonable opportunity to improve is a substantive right
 - One of the most important rights
 - Benefits both the employee and the agency
- A PIP is usually 60-90 days

**KEY-Contact the CHRC whenever
an employee is failing-DON'T
WAIT**



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Unacceptable Performance

- Initiate a Performance Improvement Plan (PIP) if:
 - Performance is unacceptable
 - Counseling/Training did not work
- Do not wait until end of the rating period
 - Contact CHRC no later than midterm if employee is failing
- If an employee fails one critical element, the Summary Rating is Failing, **BUT**
You must contact CHRC for PIP first



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Within Grade Increases (WIGI)

- If performance is failing, delay/deny WIGI pending result of the PIP
 - WIGI should be delayed/denied when performance falls below Level 3—BUT
 - Will be issued automatically unless the supervisor contacts the CHRC to initiate an action
 - Supervisor **must** contact CHRC at least 30 days in advance of WIGI due date to delay/deny
 - If employee passes PIP, supervisor **must** contact the CHRC to reinstate the WIGI



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Communicating Performance Expectations for Next Cycle

- Purpose: Set up and communicate performance expectations and job objectives for the coming year
- Done in October when the performance cycle starts over
 - Note that the new cycle begins before the former cycle completes
- Coverage:
 - Discuss goals and expectations for the next period
 - Help your employee improve his or her



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Appraisal Form



EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT

PRIVACY ACT STATEMENT

Authority: 5 U.S.C. Sections 4301 – 4305

PRINCIPAL PURPOSES: Used for performance planning and results reporting documentation requirements for the Performance Appraisal Program for General Schedule, Federal Wage System, and Certain Other Employees.

ROUTINE USES: None.

DISCLOSURE: Personal identification information is copied by the employee's rating official from other files. Thus, there is no situation where the employee must choose between disclosing or not disclosing personal information. Employee signatures or the lack of signatures on Parts A, B, C and D do not connote employee verification of any personal information on the form.



ership



EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT INSTRUCTIONS FOR COMPLETING



PART A.

1. Rating officials are responsible for ensuring that all identifying information in Section I, Blocks 1-7, is complete.
2. At the beginning of the appraisal period or upon the employee's entrance in a new position, the rating official completes Section II with employee input. The rating and reviewing officials approve the final plan.
3. The rating official, reviewing official, and employee sign and date Section III, Block 9.
4. The original of Part A is retained by the rating official and a copy by the employee.
5. Part D, Number 7, is a required critical element for all supervisors. You should copy and paste the "required" section of the supervisory element into the form under Part A. The remainder of the elements recommended for supervisors are optional.

PART B.

1. Approximately midway through the appraisal period, the rating official completes Sections I and II, Part B, and meets with the employee to discuss the employee's performance (5 CFR 430.207(b)). Additional progress reviews shall be conducted and documented as necessary.
2. The employee may enter comments in Section II, Block 8.
3. The rating official and employee sign and date Section III, Block 10, upon completion of the progress review(s).
4. The original of Part B is retained by the rating official and a copy by the employee.

PART C.

1. Within 20 days of the end of the rating period, the rating official completes Sections I, II, and III, Block 10.a. Block 11.a. or b. is completed only if monetary recognition is recommended. The rating official signs and dates Section IV, Block 12.a.
2. The rating official discusses the recommended rating of record and any monetary recognition recommendation with the reviewing and approving official(s), as appropriate. The reviewing and approving officials complete Section III, Blocks 10.b. and 11.a. or b., as appropriate. The reviewing and approving officials sign and date Section IV, Block 12.b. or 12.c., as appropriate.
3. The rating official discusses the approved rating and any monetary recognition with the employee. The employee completes Section IV, Block 12.d. and may attach documents.

PART D. EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT

There are two basic methods that can be used for developing critical elements for Performance Plans.

1. You may use the generic Performance Elements in Part D as a template for tailoring elements to an individual employee's Plan. Generic standards are also provided that will assist employees/supervisors in developing Plans.
2. The second method is to develop individualized critical elements separate from the generic template that are unique to an employee's position.

Employees and supervisors should carefully review the information in Part D and determine the applicability of the information herein and determine the most appropriate method of developing performance plans. Selecting one of the above options, or combining the two, may facilitate Plan development.

COMPLETION INSTRUCTIONS.

1. The Form is used for performance planning and results reporting documentation. A PDF-fillable version of the portion is available on capmed.mil under Civilian Personnel.
2. Send the original of the completed form to the Labor and Management Employee Relations Branch, CHRC. Specific POC information will be provided to you. The rating official and employee shall retain a copy.
3. The administrative office shall retain performance files in a secure environment for a period of no more than 3 years.



EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT

(Read the Privacy Act statement and Instructions on Pages 1 and 2 before completing this form.)

PART A

SECTION I - IDENTIFYING INFORMATION

1. EMPLOYEE NAME (Last, First, Middle Initial)		2. SSN (last 4 digits)	3. Rating Period	
			a. FROM (YYYY/MM/DD)	b. TO (YYYY/MM/DD)
4. TITLE	5. SERIES	6. GRADE	7. OFFICE	

SECTION II - PERFORMANCE PLAN

8. CRITICAL ELEMENTS (List at least one, but normally not more than five. Develop specific elements or use elements from attached list with organization specific measures.)

a.

b.

c.

d.

e.

SECTION III - PERFORMANCE PLAN SIGNATURES

9. PERFORMANCE PLAN (Sign when plan is established.)

a. RATING OFFICIAL SIGNATURE	PRINTED NAME AND TITLE	DATE
b. REVIEWING OFFICIAL SIGNATURE	PRINTED NAME AND TITLE	DATE
c. EMPLOYEE SIGNATURE (Employee's signature indicates review and discussion with the Rating Official. It does not necessarily mean that the employee agrees with the information on this form.)		DATE





EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT			
PART B			
SECTION I - IDENTIFYING INFORMATION			
1. EMPLOYEE NAME (Last, First, Middle Initial)		2. SSN (last 4 digits)	
		3. Rating Period	
		a. FROM (YYYY/MM/DD)	b. TO (YYYY/MM/DD)
4. TITLE	5. SERIES	6. GRADE	7. OFFICE
SECTION II - PROGRESS REVIEWS			
8. EMPLOYEE SELF ASSESSMENT			
9. RATING OFFICIAL ASSESSMENT			
SECTION III - PROGRESS REVIEW(S) SIGNATURES			
10. PROGRESS REVIEW(S) (Sign when review is conducted.)			
a. RATING OFFICIAL SIGNATURE		PRINTED NAME AND TITLE	DATE
b. EMPLOYEE SIGNATURE (Employee's signature indicates review and discussion with the Rating Official. It does not necessarily mean that the employee agrees with the information on this form.)			DATE

ership



EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT

PART C

SECTION I – IDENTIFYING INFORMATION

1. EMPLOYEE NAME (Last, First, Middle Initial)		2. SSN (last 4 digits)	3. Rating Period	
			a. FROM (YYYY/MM/DD)	b. TO (YYYY/MM/DD)
4. TITLE	5. SERIES	6. GRADE	7. OFFICE	

SECTION II – RESULTS

8. CRITICAL ELEMENT RATINGS (U = Unacceptable, M = Met, E = Exceeded, NR = Not Rated)				
a.	b.	c.	d.	e.
9. NARRATIVE TO SUPPORT ELEMENT RATINGS OF OTHER THAN MET (Required)				
(X if narrative continued on separate sheet.)		(X if Individual Development Plan attached)		

SECTION III – RATING OF RECORD AND MONETARY RECOGNITION

10. RATING OF RECORD			
a. RECOMMENDED (For Rating Official - Place an "X" to the left of the appropriate summary level)			
<input type="checkbox"/>	LEVEL 1 - UNACCEPTABLE	<input type="checkbox"/>	LEVEL 3 - ACCEPTABLE
<input type="checkbox"/>		<input type="checkbox"/>	LEVEL 5 - EXCELLENT
b. (X as applicable.) (If rating is changed, the reviewing or approving official must provide a written explanation.)			
<input type="checkbox"/>	REVIEWING OFFICIAL APPROVED	<input type="checkbox"/>	CHANGED TO:
<input type="checkbox"/>	APPROVING OFFICIAL APPROVED	<input type="checkbox"/>	CHANGED TO:
11. MONETARY RECOGNITION (X as applicable)			
(For Rating Official)		(For Reviewing Official)	
a. PERFORMANCE AWARD RECOMMENDED \$ _____		APPROVED	CHANGED TO
(For Rating Official)		(For Reviewing Official)	
b. QUALITY STEP INCREASE RECOMMENDED (A Level 5 rating of record is required.) YES _____ NO _____		APPROVED	DISAPPROVED

SECTION IV – RATING SIGNATURES

12. RATING SIGNATURES		
a. RATING OFFICIAL SIGNATURE	PRINTED NAME AND TITLE	DATE
b. REVIEWING OFFICIAL SIGNATURE	PRINTED NAME AND TITLE	DATE
c. APPROVING OFFICIAL SIGNATURE	PRINTED NAME AND TITLE	DATE
d. EMPLOYEE SIGNATURE (Employee's signature indicates review and discussion with the Rating Official. It does not necessarily mean that the employee agrees with the information on this form.)		DATE



Part D EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT PERFORMANCE ELEMENTS

The first five Critical Elements will probably be applicable to all positions to some degree. Critical Elements 6, 7, and 8 should be included in performance plans when appropriate. Supervisors should carefully review standards under each element, include all standards which apply to the position, and add appropriate descriptive language where indicated in the bracketed, italicized portions of this guidance.

1. Quality of Work

- Work consistently demonstrates current knowledge of field.
- Work is consistently well researched, thoroughly analyzed. *(Include other indicia of good quality work appropriate to duties performed and grade level, including the expected level of supervisory control or input.)*
- Work is consistently accurate, complete, relevant, thorough, and logical.
- Work consistently reflects sound professional judgment. *(Describe indicia of judgment appropriate to the grade level, such as weighing alternatives, considering implications, recognizing when direction from superiors is necessary or appropriate, etc.)*

2. Productivity

- Work is consistently planned and prioritized to reflect mission and organizational needs. *(The standard should specify the level of supervisory input or control of planning expected at the grade level, such as "with minimal/occasional/regular supervisory input.")*
- Work is consistently completed within established deadlines.
- Consistently advises supervisor and others concerned when it becomes necessary to extend deadlines due to circumstances beyond the employee's control.
- Work is consistently planned to ensure efficient use of resources.
- The volume of work done consistently contributes to organizational goals. *(If the work of the organization can be quantified, this standard could state that the volume of work within a specified timeframe meets the organization's numerical goals. Numerical goals must, however, be reasonable, attainable, and rationally apportioned among employees.)*

3. Quality of Written Communications

- Drafts are consistently clear, relevant, concise, well organized, and appropriate to audience. *(Where appropriate for the grade level, standard may state that drafts rarely require additional research or substantial reorganization.)*
- Finished products are consistently free of spelling and grammatical errors, conform to appropriate office formats, and appropriately incorporate review and/or coordination of initial drafts. *(If there is some way to quantify and track the total number of written work products, it may be possible to build an acceptable error rate into the standard.)*

Error rates must specify whether they apply to finished or draft work products, be reasonable and attainable, and must be uniformly applied.)

- Written work consistently requires a level of supervisory review appropriate to the grade level. *(The standard should describe the level of review such as "rarely requires substantive editing." Where appropriate, the standard can state that "drafts rarely require a second rewrite" or "never require a second rewrite due to failure to implement supervisor's instructions.")*

4. Quality of Oral Communications

- Briefings and other oral presentations are consistently clear, well-organized, accurate, and appropriate to audience. *(Standard should describe whatever indicia of one-sided communications efforts are appropriate, including appropriate responses to questions or comments from audience.)*
- At meetings and in verbal exchanges with others, consistently conveys information accurately, advocates effectively, listens carefully, and responds appropriately. *(Again, the standard should describe additional indicia if quality interchanges, depending on nature of position.)*

5. Teamwork and Customer Responsiveness

- Consistently ensures appropriate coordination so that concerned individuals and organizations are included in and/or informed of decisions and actions.
- Consistently keeps supervisor informed of anticipated problems and, where appropriate, suggests solutions or advises supervisor of course of action employee proposes to follow.
- Consistently works well with others and maintains a professional demeanor in dealings with co-workers, clients, and supervisors, including appropriate respect for cultural, ethnic, gender, and other differences and full cooperation with the equal employment opportunity process when necessary.
- Consistently participates in team or group efforts effectively by cooperating with others, demonstrating appropriate respect to views of others, responding constructively to criticism or dissenting views
- Consistently responds to requests for information or assistance from clients and others outside the organization in a timely fashion. *(The standard may specify a reasonable response time for specific types of requests such as "consistently returns telephone calls by the close of the next business day." Note that this measure of responsiveness to clients, etc., should be distinguished from measures of organizing and prioritizing work to meet deadlines, as measured in critical element 2, above.)*

ship





Part D (continued)
EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT
PERFORMANCE ELEMENTS



6. Security

(This should be a separate critical element whenever handling sensitive or classified information is a significant part of the employee's duties. Absolute standards permitting no deficiencies are acceptable in the security area.)

- Attends all required security briefings. If any briefings are missed due to circumstances beyond the employee's control, promptly advises supervisor and arranges for substitute briefing.
- Follows all rules and procedures for proper handling of classified materials.
- Promptly reports security violations to the proper authorities.

FOR SUPERVISORY EMPLOYEES

7. MANDATORY CRITICAL ELEMENT FOR SUPERVISORY EMPLOYEES

Use required text as follows:

CRITICAL ELEMENT:

Align workforce decisions in accordance with guidance. Support employee performance in accordance with performance management system. Focus on improving skills to better support staff performance and internal/external communications.

STANDARDS:

Support compliance with applicable guidance/laws/regulations. To support professional development, supervisors will foster a results-oriented performance culture by personally participating in at least two training events per year—a minimum of one training course and one practical training event related to primary job responsibilities or enhanced organizational performance/communication. Supervisors will identify a 2009 DEOMI survey initiative for discussion, implement within their work area, and document via meeting minutes. Carry out supervisory responsibilities in accordance with established deadlines.

The following standards describing the supervision of office function and performance of subordinates may be utilized in conjunction with the above mandatory critical element.

- Consistently ensures that work is distributed in an equitable manner based on the urgency, complexity, and sensitivity of tasks, existing work loads, and the capabilities and experience of subordinates.
- Regularly monitors the work load of subordinates, including number and nature of assignments and time expended on specific significant matters and on categories of routine matters. Requests for staffing changes are thoroughly supported and designed to ensure efficient function of the office.
- Consistently provides clear and constructive feedback to subordinates about their performance, including timely and accurate performance appraisals, notices of performance deficiencies, and performance awards and recognition.
- Promptly and consistently addresses performance and conduct deficiencies of subordinates with appropriate guidance, counseling, and/or discipline.
- Promptly and consistently provides positive feedback about superior job performance or individual tasks, including recognition or awards, where appropriate, to subordinates.
- Consistently ensures timely preparation of performance standards which conform to available guidance.
- Consistently maintains appropriate documentation to support performance appraisals, awards, and performance or conduct-based actions.
- Ensures that individual training needs of subordinates are regularly evaluated and that training is provided consistent with the agency staff development plan and agency goals.
- Consistently ensures that office budgets are developed that comply with budgetary policies and constraints and enable the office to accomplish its mission in a timely and efficient manner.
- Consistently manages the office budget to ensure compliance with applicable policies and regulations.
- Consistently makes workplace decisions on the basis of merit, treats subordinates fairly, and ensures that everyone under the supervisor's supervision consistently respects cultural, ethnic, gender, disability-related, and other differences in the workplace.
- Consistently responds promptly and effectively to complaints about the conduct of subordinates, customers, and peers, including, where appropriate, seeking the assistance of the Equal Opportunity (EEO) Program Office, counseling or disciplining individuals engaging in inappropriate conduct, reporting problems to chain of command, and obtaining diversity and EEO training.



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Part D (continued) EMPLOYEE PERFORMANCE PLAN AND RESULTS REPORT PERFORMANCE ELEMENTS	
<ul style="list-style-type: none">- Consistently cooperates with the EEO process, including informing upper level management of the existence of the complaint and of the steps the supervisor plans to take to address it, identifying possible resolutions as early in the complaint process as possible and discussing them with EEO counselors, responding promptly and fully to requests for information from EEO investigators, and making self available to work with agency representatives.	<p>8. Program Management (for non-supervisory managers)</p> <p>(There should be a program management element for non-supervisory managers which includes a standard for those responsibilities as well as for their EEO responsibilities.)</p> <ul style="list-style-type: none">- Consistently ensures that all workplace decisions made in the manager's program area are based on merit principles and program requirements.- Consistently ensures that efforts to recruit, promote, train, and provide other opportunities for advancement within the manager's program areas are appropriately made to maximize the area of competition, including consultation with the EEO office to ensure that appropriate steps are taken to recruit individuals whose sex, race, national origin, or disability status may be under-represented in the workforce.- Consistently ensures that supervisors respond appropriately to EEO complaints, whether formal or informal, that they have current training in EEO procedures and issues, and that they have access to and appropriately use legal, personal, and EEO resources



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Labor and Management Employee Relations Division

- **Ms. Keisha Hurst-Chief, L/MER**
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